### Nutshell \*

## **Nutshell Quotes**

Create, Send, and Track Custom **Quotes From Nutshell** 

Close deals faster with a quoting tool fully integrated with your CRM. Create, send, and track custom sales quotes for clients and customers—all in just a few clicks, right inside Nutshell.



Will Gordon Director of Marketing at Nutshell





### Today's Agenda

- What is Nutshell Quotes?

- Demo 15 minutes

- How to access Nutshell Quotes 5 minutes

- Q&A

Please ask your questions in the chat throughout the presentation and we'll answer what we can!



10 minutes

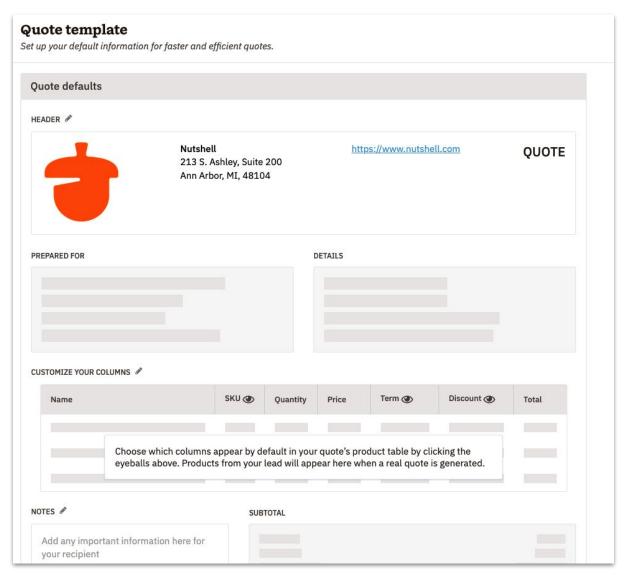
# What is Nutshell Quotes?





### Create custom quotes seamlessly from Nutshell

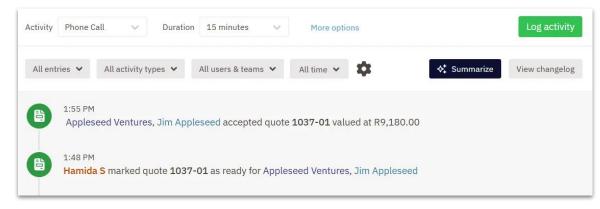
- Build a professional, branded quote template for fast quoting
- Create new quotes directly from a Lead page
- Auto-populate quotes with Lead data - from contact details to product information
- Review and edit quote fields before sending to ensure accuracy
- Share quotes with your prospects as shareable links or PDFs

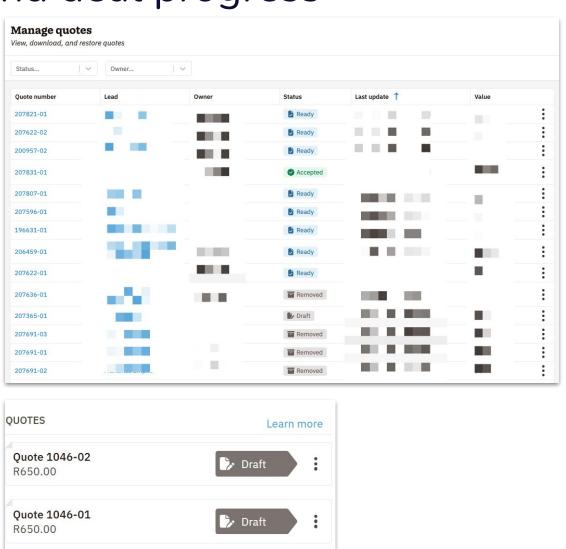




### Seamlessly track quote status and deal progress

- View all quotes and their status under Sales > Quotes > Manage
- Track quote status on the Lead page, from *Draft* to *Accepted*



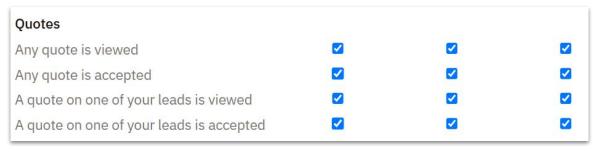


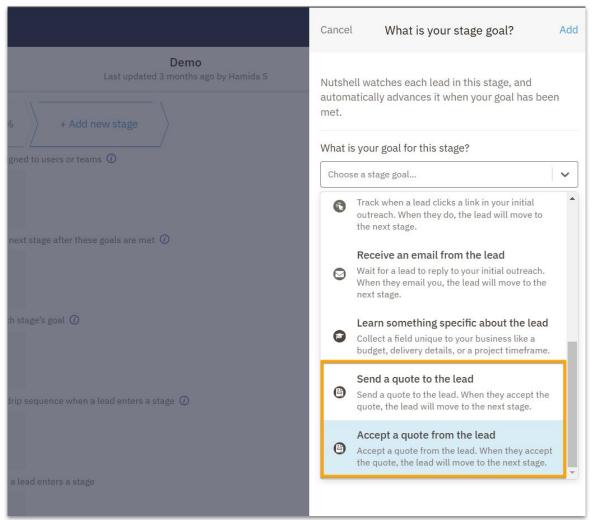
+ Add a quote



#### Automate quoting to keep deals on track

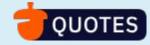
- Create automations to move leads through your pipelines once a quote is sent or accepted
- Get instant alerts when a prospect views or approves a quote so you can follow up right away







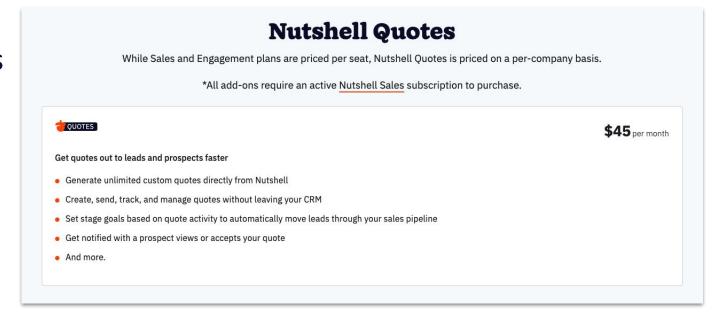
# Let's Walk Through Nutshell Quotes





## How to access Nutshell Quotes

- Nutshell Quotes is an add-on available for \$45/month for your entire team
  - most comparable software is "per user per month"
- Customers on any Nutshell Sales plan can purchase Nutshell Quotes
- To purchase Nutshell Quotes:
  - Settings > Administration > Billing > Update my plan
  - Quotes will be on the "Add-ons" page
- To start using Nutshell Quotes,
  go to Sales > Quotes > Template





## Q&A



## Join our monthly support-led webcast

Join us on the 4th Wednesday of every month at Noon eastern for our recurring webcast where we go over how to set up, use, and get more out of the Nutshell essentials.

It's also a great opportunity to be able to ask a question and be **shown** an answer.

You can register at: <a href="https://www.nutshell.com/quided-tours/nutshell-best-practices">https://www.nutshell.com/quided-tours/nutshell-best-practices</a>

Our next Nutshell Best Practices webcast will be on March 26, 2025 at 12:00 PM EST.



## Thanks for joining us today!

#### **Upcoming releases:**

- Marketing Email link report: See exactly which email recipients clicked on which links in your Email marketing campaigns (Released March 10th Available on Marketing Pro)
- Facebook and Instagram integration in Nutshell Engagement: Add Facebook Messenger and Instagram DMs to your engagement channels. You'll be able to manage conversations with leads through Messenger and Instagram, create leads from new messages, and more
- Smart vs. fixed audiences: Choose whether your audiences update dynamically or remain the same. Also uniting "Saved lists" and "Audiences"

Keep up to date with all of our Product Updates (<a href="here">here</a>) or subscribe to our <a href="here">Shipping News newsletter</a>.

